

The AI Transformation Decision Guide

Choose useful work. Compare the options. Build an implementation your team can own.

The decision before the technology

A business transformation changes how work gets done: the information people use, the decisions they make, the systems they rely on, and the handoffs between them. AI may be part of that change. Its role should follow the business problem and the evidence.

Use this original Clairvance guide to prepare a first implementation with operations, finance, and technology colleagues. It provides a planning method, not a maturity benchmark or a promise of results. A useful outcome can be an AI-assisted workflow, a simpler system change, or a decision to collect better evidence first.

Decision	What your team should leave with
1. Choose the work	A named owner, trigger, outcome, and workflow boundary.
2. Establish the baseline	Observed volume, effort, delay, rework, and evidence gaps.
3. Compare the options	A reasoned choice among process changes, existing software, integrations, and AI.
4. Design the implementation	Clear access, review, acceptance, and support responsibilities.
5. Decide what follows	A controlled pilot and a documented expand, adjust, or stop decision.

For: business sponsors, operations leaders, finance leaders, and technology partners. Work together on a real process; a presentation alone cannot establish how the work operates.

Make the problem observable

Choose a recurring process that your team can describe, observe, and improve.

Write the trigger and completed outcome in one sentence. Include the owner and the situations that need a human decision. A boundary prevents a small starting problem from becoming an undefined promise to transform everything.

Illustrative example: distributor order intake

Trigger: a purchase order arrives by email. Outcome: a reviewed order is ready for entry into the ERP. The draft process might identify the customer, extract order lines, check product and pricing references, and route exceptions to an order specialist. This is a constructed example, not a Clairvance client result.

Measure	Collect this evidence
Volume and period	Number of relevant orders over a named observation period; note seasonal or unusual conditions.
Active effort	Minutes spent reading, checking, entering, reviewing, and correcting an order.
Elapsed time	Time from arrival to the agreed completed state. Keep waiting time separate from labor.
Quality and exceptions	Missing fields, duplicates, incorrect entries, conflicting references, and work sent back.
Source and confidence	System log, timed observation, or estimate; record sample size and what remains unknown.

A transparent planning calculation

If 1,200 relevant items each require an average of 8 handling minutes, the baseline is 160 handling hours per month: $1,200 \times 8 / 60$. If a proposed process takes 5 minutes **including review and exceptions**, the difference is 60 hours. These are illustrative assumptions to test, not forecast savings.

Use the Workflow Opportunity Workbook to collect the baseline and candidate shortlist. Do not treat a small convenient sample as representative without checking.

Use AI where it earns its place

Compare the same workflow and sample cases across more than one approach.

Option	When to investigate it	Evidence to request
Remove or simplify	A step repeats work, adds no needed control, or exists because ownership is unclear.	Why the step exists; who accepts the changed responsibility.
Configure existing software	A licensed system may already provide the needed function.	Feature demonstration in the relevant edition; permissions and setup effort.
Rules or integration	Inputs and decisions are structured and sufficiently consistent.	Supported interface, exception rules, retry behavior, and maintenance owner.
Established product	The problem is common enough for a specialized product.	Fit to your sample cases, export options, support, and continuing dependencies.
AI-assisted workflow	Inputs vary or need language interpretation, and outputs can be meaningfully reviewed.	Representative evaluation, error handling, reviewer workload, and permitted actions.

Use the same difficult cases

In the distributor example, test a missing product code, conflicting price, changed delivery address, duplicate attachment, and unavailable ERP. Ask each approach to show how work continues and what a person must resolve. Verify current vendor features against official documentation before relying on them.

Record the tradeoff

Choose the option that best meets the agreed requirements with a manageable operating burden. Document why alternatives were rejected and what evidence could change that choice. A simpler configuration can be the right transformation step.

Separate capacity from cash

An honest business case makes assumptions, costs, and realization conditions visible.

Question	What belongs in the answer
What improves?	Service time, handling effort, accuracy, capacity, or a specific financial outcome.
What effort remains?	Review, corrections, escalations, monitoring, maintenance, training, and adoption support.
Which costs continue?	Software, model usage, hosting, support, data maintenance, and vendor dependencies.
How does value become real?	More useful work completed, changed overtime, changed outside expense, or another stated mechanism.
How uncertain is the estimate?	A range for volume, handling time, exception rate, adoption, and ongoing effort.

Released time is potential capacity. It becomes a cash saving only when a specific expense changes. If the team uses that capacity to improve service or absorb growth, describe that benefit and how it will be measured. Avoid counting the same time twice as both cost reduction and extra output.

Compare conservative, base, and optimistic scenarios

Start with observed data where available. Change one uncertain assumption at a time to see which matters most. A result that depends on full adoption and almost no exceptions deserves a stronger test before approval. Include rollout timing; a steady-state estimate is not the same as the first month of operation.

Specify the evidence that would change the decision

Examples include review taking longer than expected, too few eligible transactions, inaccessible reference data, or a newly discovered feature in the existing system. State the condition and the person responsible for reassessment.

Design the operating boundaries

Define what the workflow may read, suggest, and change before it handles real work.

Boundary	Decide before implementation
Inputs and reference data	Which records are permitted, where they come from, who owns them, and how conflicting versions are handled.
Read and write access	The minimum access required for each system; which changes need explicit approval.
Review and escalation	What the reviewer sees, which cases stop, who resolves them, and how long work can wait.
Records and visibility	What evidence of an action is retained, who may inspect it, and how errors are reported.
Failure and recovery	What happens during model or integration failure, duplicate retries, and manual fallback.
Change ownership	Who can update configuration, prompts, rules, permissions, and dependencies; what requires retesting.

For the order example, the initial boundary might allow a draft order and exception flags while keeping product substitutions, price overrides, and final submission with an authorized person. This is an illustrative design choice; the actual boundary depends on the business and consequences of an error.

NIST AI RMF 1.0 provides voluntary guidance using Govern, Map, Measure, and Manage functions [1]. These prompts are Clairvance planning guidance, not a NIST assessment or certification. NIST lists a revision in progress; check the current status when setting requirements [2].

Give the change a real owner

Technology, operating responsibility, and employee adoption need to fit together.

Responsibility	Decision or activity
Business sponsor	Confirms the intended outcome, resolves priority conflicts, and authorizes the next stage.
Process owner	Defines good work, owns exceptions, reviews performance, and decides whether the process is improving.
People doing the work	Validate the current process, test everyday and difficult cases, and explain practical consequences.
Technical owner	Approves access, supports integrations, manages changes, and maintains recovery procedures.
Finance partner	Challenges assumptions and agrees how capacity and cash effects will be measured.
Specialist reviewers	Review security, privacy, contractual, or other requirements relevant to the specific workflow.

Explain what changes in the working day

Show the new trigger, review queue, expected action, and escalation route. Practice with missing information and failed systems, not just the ideal case. Give people a place to report confusing outputs and an owner who will respond. Make responsibilities explicit when the supplier is no longer in the room.

Measure adoption without hiding the cost

Track the share of eligible work using the new process, the review effort it creates, reasons people return to the old process, and unresolved items. A team can have access to a tool without finding it useful. Use that evidence to revise the workflow and training.

Make acceptance observable

Agree expected behavior and review the whole process before widening its use.

Test case	Expected evidence
Ordinary complete input	Correct output in the agreed format and destination, with the intended review step.
Missing or conflicting data	A clear exception, no invented field, and enough context for a person to resolve it.
Duplicate or retried request	No unintended repeated action; duplicate behavior is visible and explainable.
Unfamiliar document or message	A bounded response or escalation when the input is outside agreed coverage.
Instruction inside a document	Untrusted content cannot change authorized operating rules or system permissions.
Unavailable downstream system	Work is preserved or stopped safely, with an understood retry or manual route.
Unauthorized action or access	The attempted action is prevented and handled according to the access design.
Real reviewer workload	People can review, correct, and escalate within the agreed operating capacity.

Use representative evaluation cases and keep final evaluation examples separate from development examples where practical. Record the expected result, observed result, test conditions, reviewer, and retest. A small successful evaluation supports a next test; it does not prove performance in every future setting.

Choose acceptance thresholds for the actual consequences and volume of the workflow. Expand, adjust, keep observing, or stop based on the evidence. Document how to pause the process and who can authorize a restart.

Bring a clear next step to the table

A first implementation should end with an operating decision, not an unfinished experiment.

Your decision brief	What to record
Problem and boundary	Trigger, completed outcome, business owner, participants, and excluded work.
Evidence and assumptions	Baseline, observation period, sample limitations, and unresolved questions.
Chosen approach	Options considered, reason for the choice, access needs, and dependencies.
Acceptance and responsibility	Test cases, thresholds, human review, launch decision, and continuing support.
Next decision	Pilot coverage, review date, evidence required to expand, and conditions to pause.

About this guide

Clairvance created this method to help teams prepare business transformation work. All examples and calculations are illustrative. The guide does not establish a benchmark, guaranteed outcome, or legal compliance. Adapt it with the people responsible for the workflow and any specialist requirements that apply.

Primary references

[1] National Institute of Standards and Technology. *Artificial Intelligence Risk Management Framework (AI RMF 1.0)*. January 26, 2023. Voluntary guidance; functions in Part 2. Accessed September 9, 2026. [Read the framework](#).

[2] National Institute of Standards and Technology. *AI Risk Management Framework*. Current status and resources; revision in progress noted when accessed September 9, 2026. [Check current guidance](#).

Put the guide to work

Use the companion Workflow Opportunity Workbook or AI Vendor Evaluation Scorecard. Clairvance helps teams examine a recurring problem, compare implementation options, and put the right change into operation.

[Discuss a workflow with Clairvance](#) | Remote and on-site work across the United States.